

Whitefish Trust Land Plan Advisory Committee  
Thursday and Friday, November 13<sup>th</sup> and 14<sup>th</sup>, 2003  
Whitefish Credit Union

**Committee Members Attending**

Charles Abell, Whitefish Credit Union  
Tyler Tourville, Flathead Fat Tire Club  
Sheila Bowen, Whitefish Chamber of Commerce  
Rob Hedstrom, Whitefish Rifle Club  
Richard Marriott  
Jeff Gillman (alternate)  
Leesa Valentino  
Donna Maddux, Superintendent, Flathead Co. Schools  
Alan Elm, ReMax of Whitefish  
Paul McKenzie, Stoltze Lumber  
Greg Gunderson  
David Greer, DNRC  
Steve Lorch, DNRC

**Absent** – Shirley Jacobson (alternate)

**Other Attendees**

Janet Cornish, CDS of Montana, facilitator  
Andy Feury, Mayor of Whitefish  
Greg Poncin, Kalispell Unit Manager, DNRC  
Bob Sandman, Stillwater Unit Manager, DNRC  
Eric Mulcahy, Tri-City Planning Office

**Thursday evening, November 13<sup>th</sup>, 2003**

**Purpose of the Whitefish Area Plan**

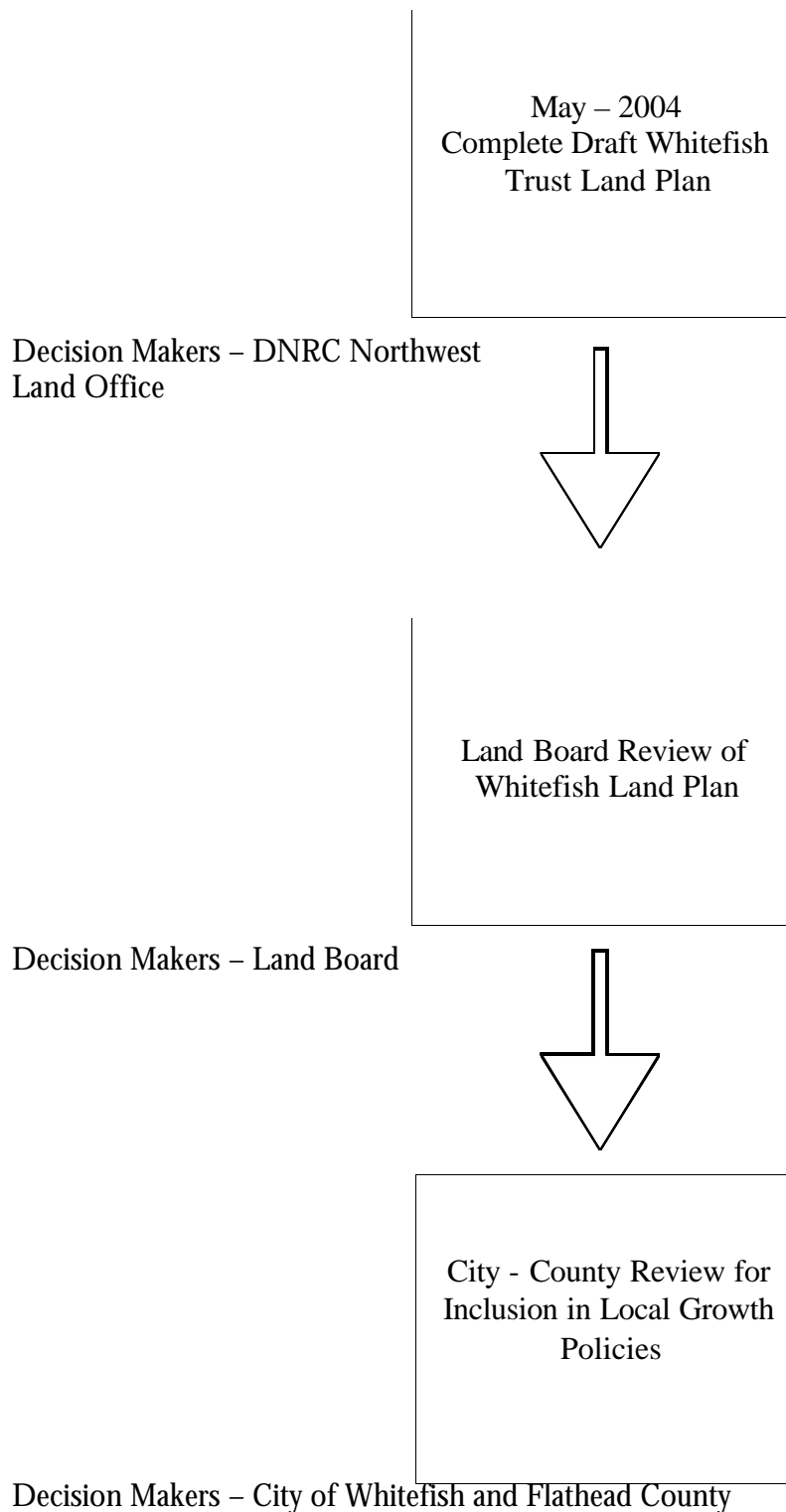
The purpose of the plan is to provide a basis for determining land use opportunities on school Trust lands and to link that information and policy direction to local planning documents through its inclusion in existing comprehensive plans (growth policies and master plans) at the city and county level. The plan will provide a framework within which land use proposals may be reviewed and evaluated. It will also provide an opportunity for the local community to become informed of and involved in the planning process and, in turn, for DNRC to establish its role as a stakeholder in local land use planning decisions. Timber production is currently the primary land use for these Trust Lands and it is within this context that this planning process will occur.

*Bringing the needs of the beneficiaries and the needs of the surrounding community together in a strategic plan for use of the Montana Trust Lands in the Whitefish area is at the heart of the Whitefish Area Plan. It is imperative that the local community provides the critical input that will help guide this process.*

In addition to public meetings and interviews, the Montana Land Board has chartered an Advisory Committee to assist DNRC in identifying community issues and concerns and in drafting the Plan.

Chart 1 provides an overview of the planning process and decision making points.

**Chart 1. Decision Making Process for the Whitefish Area Trust Land Plan**



## **Roles and Responsibilities**

### ***DNRC***

The Montana Department of Natural Resources and Conservation is responsible for preparing the Whitefish Area Trust Land Plan. David Greer is the project manager and will assure that the plan is completed on schedule. He will be the point of contact for members of the Advisory Committee and will help arrange meetings and assist in facilitating discussion as needed. All communication regarding the plan will be directed to David. David Greer and Steve Lorch, also of DNRC will serve as members of the Advisory Committee.

### ***CDS of Montana***

CDS of Montana, consultant to DNRC will author the Whitefish Area Trust Land Plan and facilitate Committee meetings and workshops which will be held on a monthly basis. CDS will also assist with arrangements and preparations for public presentations which will occur in conjunction with CDS monthly visits.

### ***Advisory Committee***

Through a facilitated discussion, the Advisory Committee identified its roles and responsibilities in the planning process as follows:

- Assure that the plan takes a long term view (more than 20 years) in order to benefit the state's schools and all of Montana's citizens. In light of increasing population in the Flathead (predicted to be 111,740 by 2025 according to the Montana Census and Economic Information Center of the Department of Commerce), the work of the Committee will become increasingly important.
- Maintain public involvement in the process through the DNRC web site and through public presentations. Each of the Committee members can, in turn, report to the organizations and agencies they represent. For example, the Chamber of Commerce has 435 members that can be kept informed through the Chamber representative on the Committee.
- Structure a cumulative vision by narrowing our focus and defining our direction.
- Provide strength and merit to the plan and assure that it can withstand political changes.
- Help DNRC understand what is important to us as a community.
- Assure that the plan fosters responsible development with regard to wildlife, healthy forest management, and defensible space (related to fire hazards).
- Increase public awareness of the nature of state trust lands and this planning process in particular.
- Assist DNRC in looking at the bigger picture regarding its mandate to manage state trust lands for their highest and best use.
- Keep local governments involved and informed, particularly in light of the potential changes in the size of the Whitefish planning jurisdiction.
- Stay attuned to the concerns of adjacent property owners.
- Seek ways in which to meet the revenue needs of the state trust land beneficiaries while maintaining those values that are important to the quality of life of the community including recreation.

- Assure that the plan is meritorious, remembering that these lands are for the benefit of the schools for many generations to come.
- Realize that the work of the committee has the potential to have a real impact in the long term.
- Help develop a plan that is flexible, proactive, and comprehensive in nature, addressing the lands in relationship to surrounding land uses.

### **Friday, November 14<sup>th</sup>, 2003**

The land use planning process is typically organized in a hierarchical fashion as follows:

- Mission
- Goals
- Policies
- Implementation Strategy

### **Mission**

As part of the public involvement process for this plan ten public meetings were held during the months of May, June and August of 2003. In addition, the consultants interviewed 35 members of the community. The public meetings, interviews, discussions with DNRC staff, and the Montana statutes which govern the management of state trust lands, helped us to define the overall mission of Whitefish Plan. This mission is as follows:

The Whitefish Plan will

- ⇒ Seek the highest development to produce the greater revenue from state trust lands
- ⇒ Consider environmental factors in the design and implementation of projects and programs
- ⇒ Protect the future generating capacity of the land
- ⇒ Address community values and concerns

### **Goals and Policies for the Whitefish Plan**

The following list of goals was provided by the members of the Advisory Committee:

### **Goals**

- Preserve recreational uses to the extent possible, in light of the area's rapid growth
- Preserve as much open space and public access as possible
- Preserve historic land uses while capitalizing on new opportunities to maximize revenue to the Trust
- Successfully integrate responsible development while protecting the values that the community identifies as valuable including viewsheds and wildlife corridors
- Maintain, in perpetuity, the economic value of state trust lands in the Whitefish area
- Show continued annual revenue growth overall in the trust land portfolio while continuing community uses of the properties
- Seek more developed recreation in open space areas to increase recreation related revenue
- While meeting revenue needs, provide a balance between open space and recreation and

- meeting future revenue growth from residential and commercial development
- Protect recreation and community values while generating reasonable revenue returns
- Comply with existing growth policies and master plans
- Consider trust land mandate when evaluating land use opportunities
- Apply an active management policy for open space understanding that open space is not static
- Protect land linkages and associated activities around Whitefish Lake
- Reduce fire danger in the forest/wildland-urban interface
- Identify opportunities for securing key open space features such as connectivity
- Identify opportunities for making up the financial difference between the actual fair market value of lands and the value they have to the community (e.g., as open space).
- Offer a mix of new revenue opportunities and the enhancement of existing ones
- Protect watershed integrity
- Balance long and short term revenues

### **Major Goals**

This list of goals can be encapsulated in the following five major goals. For each of these goals, the group identified a set of associated policies. Some of the policies are drawn from the longer list of goals. These are tentative only and will be reviewed by the Advisory Committee at their next meeting. In addition, a number of policies have been added for the group to consider. They are presented in italics.

### **Goal #1 Balance traditional uses including timber on state trust lands with new land use opportunities to produce revenue**

#### **Policies for Goal #1**

- Establish a system for transferring development rights to assure that the greatest revenue is derived from the land while maintaining traditional uses such as recreation
- Provide more developed recreation opportunities to increase revenue
- Address funding strategies to secure public (vs. trust land) ownership of open space
  - Community Forests (an implementation strategy)
- Encourage sales and leases for conservation easements to both private parties and conservation groups that maintain historic access, recreational and economic (including timber) uses.
- *Encourage commercial and residential activities that benefit from open space and public access such as recreation based businesses*
- *Design timber sales in a manner that is complimentary to other land uses including residential, commercial and recreational activities*

### **Goal #2 Look at opportunities to increase revenue to the Trust**

**Policies for Goal #2** *(Additional Policies should be added here which address other revenue source opportunities such as residential and resort commercial development.)*

- Establish a system for tracking current and projected state trust land revenue over 20

- years
- Identify opportunities to buy more land for the trust to help increase revenues

### **Goal #3 Protect the environment (wildlife corridors/habitat, watersheds, viewsheds) and reduce hazards associated with development**

#### **Policies for Goal #3**

- Require the application of “defensible space” to reduce fire hazards in the wildland urban interface
- Identify and protect wildlife corridors
- Protect and improve water quality where possible
- Manage open space with respect to timber, wildlife, and access.
- Successfully integrate responsible development while protecting the values that the community identifies as valuable including viewsheds and wildlife corridors
- *Prohibit development from occurring in areas that are not environmentally suitable including areas with steep slopes, floodplains, areas with poor drainage, areas critical to threatened and endangered species, and other critical wildlife habitats and corridors.*

### **Goal #4 Provide for public access to and management of state trust lands for recreation and other open space amenities**

#### **Policies for Goal #4**

- Require cluster or large tract development with a limited number of units for residential uses on state trust land
- Follow the principal – no development will result in the restriction of public access to open space
- Require that residential *and commercial* development provide for continued public access and open space
- Increase public awareness regarding state lands and their purpose through better signage and information regarding permits and licenses (more locations)
- Encourage partnerships with organizations to help raise revenue and provide maintenance for recreational uses to foster responsibility and accountability
- Require real estate plans to address the management of associated open space
- Enforce regulations associated with land use licenses and permits
- Reduce vandalism on state trust lands
- Protect land linkages and associated activities around Whitefish Lake

### **Goal #5 Integrate the Whitefish plan with local land use policy**

#### **Policies for Goal #5**

- Require development projects to bear cost of additional infrastructure (*physical infrastructure including roads, water and sewer and utilities and service related infrastructure including police, fire and emergency medical*) required to serve additional demand
- Comply with existing growth policies and master plans
- Require any development to conform to local land use regulations

- Make use of development agreements (*performance standards*).